

May 18, 2017 Meeting

The next regular program for the Knoxville Estate Planning Council will be held on Thursday, May 18, 2017, at Cherokee Country Club

Meet and greet 5:15 PM

Dinner: 5:45 PM

Presentation: 6:00 PM

Inside Story on Chancery Court: Before You Get to the Chancellors

Speakers: Howard Hogan, Clerk & Master with Anne McKinney and Victoria Tillman

Clerk & Master Howard Hogan, with assistance from Anne McKinney and Victoria Tillman, will be discussing the role of Clerk & Master in the Chancery Court, as well as the structure of the Court. He will address specific issues related to hearings before the Clerk & Master and the Chancellors. Clerk & Master Hogan will respond to pre-submitted questions, as well as entertain questions from the audience, about Chancery proceedings and laws related to estate planning and estate administration. Please email your questions to cbangash@hga-cpa.com by Friday, May 12, 2017.

Course Objective: Gain insight to the procedures and laws related to the Chancery Court.

Howard G. Hogan has served as Clerk and Master, Sixth Judicial District since his appointment on September 1, 1998. Mr. Hogan graduated with a B.A. degree from Gettysburg College in 1971 and received his J.D. degree from the University of Tennessee College of Law in 1974. Prior to his appointment as Clerk and Master, Mr. Hogan practiced law with an office in Knox County with the firm of Gresham & Hogan for twenty-three years with the primary area of his practice encompassing representation of clients in real estate matters. As Clerk and Master, Mr. Hogan currently supervises the administration of decedents' estates under the supervision of the Chancellors and also hears a variety of matters referred to him by the Chancellors.

Anne M. McKinney is the founding partner of McKinney & Tillman, P.C., where she focuses her practice on estate planning, estate administration and probate law, including estate, gift and generation skipping transfer taxation. She has more than 38 years of experience in these areas, including a decade auditing estate and gift tax returns with the U.S. Internal Revenue Service. A member of the Duke Estate Planning Council and the prestigious American College of Trust and Estate Counsel, Anne is a frequent lecturer at the University of Tennessee college of Law and countless legal conferences. She is the author of Estate Planning in Tennessee, and the creative force behind several popular videos on YouTube, where she posts as LadySingsTheNews. Anne received her B.A. degree, magna cum laude, from Duke University and her J.D. degree from the University of North Carolina School of Law. She lives in Knoxville with her husband, Larry Hartsook, her wonderful son, Rand McKinney, a rambunctious golden lab and a thoroughly disgusted Siamese cat.

Victoria Tillman is a shareholder in the law firm McKinney and Tillman, P.C., having joined the firm as an associate in 2002; she focuses her practice in the areas of estate planning, estate and trust administrations, estate and gift taxes, business formation, succession planning, and formation of tax exempt organizations and approval of tax-exempt status. Before joining the firm, Victoria managed a solo practice in East Tennessee, and she previously worked at the Memphis firm of Pietrangelo Cook. Victoria received her J.D., *summa cum laude*, from the University of Memphis School of Law, and her Bachelor of Business Administration degree, with a major in Accounting, from Memphis State University, graduating *summa cum laude*. Victoria is a member of the Knoxville, Tennessee and American Bar Associations, and the Knoxville Estate Planning Council. Victoria currently serves on the Board of the Knoxville Estate Planning Council, and she served as the past chair of the Tennessee Bar Association. Estate Planning and Probate Section for years 2010-2011 and 2011-2012; Victoria continues to actively serve in the Section on the Executive Council. Victoria resides in East Tennessee with her husband, Keith, and their children, Alex and Ellen.

Board Member Elections

KEPC will be voting on next year's officers and board members at this month's meeting. The proposed new board will consist of the following members: President – Joel Roettger; VP – Angelia Nystrom; Secretary – Charles Farmer; Treasurer – Andy Hampson; At-Large Director – Susan Foard; At-Large Director – Victoria Tillman; At-Large Director – Nancy Hertwig; At-Large Director – Rachel Arendt; Past President – Renee Harwell. Rachel Arendt is proposed as the new board member to replace out-going board member Renee Harwell. If you would like to nominate another member for consideration at the next meeting, please contact one of the board members.

Member Contact Information

KEPC's main form of communication is email. If any of your profile information changes, especially your email, please update the necessary information on the KEPC website (kepctn.org). Meeting announcements, membership renewals, and other information is delivered via email. Please do not uncheck the "Contact Preference" for email under "Contact Information". This feature allows KEPC to send emails to members but will not display your email if that is your preference. Regular meeting announcements are sent out in January, March, May, September, and November. Membership renewals are sent out in August. If you stop receiving regular emails, please contact Carol Bangash.

Please RSVP no later than 12:00 PM Monday, May 15, 2017. Reservations taken after May 15, 2017, will **NOT** include dinner. If a reservation needs to be canceled, notification must be sent no later than 12:00 PM Monday, May 15, 2017, or the member will be billed \$35 for the cost of the dinner. Guests are welcome to attend the meeting with a member. There is a guest fee of \$35. Students and emeritus members have a special rate of \$10. If a guest reservation needs to be canceled, notification must be sent no later than 12:00 PM Monday, May 15, 2017, or the member is responsible for the \$35 or \$10 charge. To register for this course, go to kepctn.org, or call 865-474-7360.

Knoxville Estate Planning Council next meeting scheduled for September 14, 2017

Delivery Method: Group Live
Program Level: Basic
Prerequisites: None
Advanced Preparation: None
CLE Credit: 1 hour General
CLU Credit: 1 hour General
CPE Credit: 1 hour Tax

Due to this program being presented free of charge, there will be no refunds issued. For more information regarding refund, complaint and program cancellation policies, please contact our offices at 865-474-7360.

Knoxville Estate Planning Council is a registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org

Knoxville Estate Planning Council

PO Box 53164
Knoxville, TN 37950
Phone: 865-474-7360
Fax: 865-691-3064